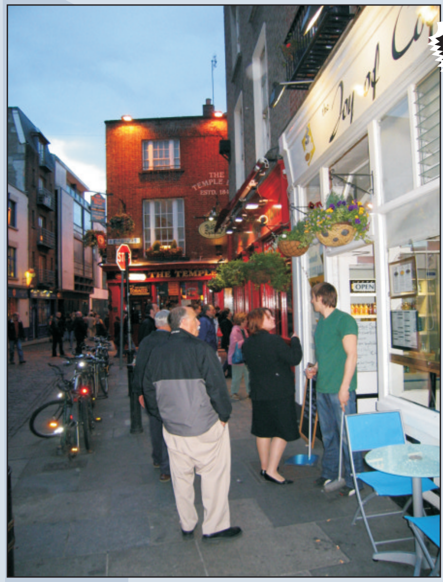
Play



Did you know?
Many of the benefits from entertainment, cultural amenities and recreation accrue to local residents, but opportunities for these activities can also attract visitors from outside the Columbus area. Of the 997.6 million person trips taken by U.S. travelers in 2000, 24% (or 239.4 million) visited a museum or attended a cultural event and approximately 33% were for shopping. Other destinations include active streets animated by after-hours shops, restaurants and pubs as demonstrated in the above image.

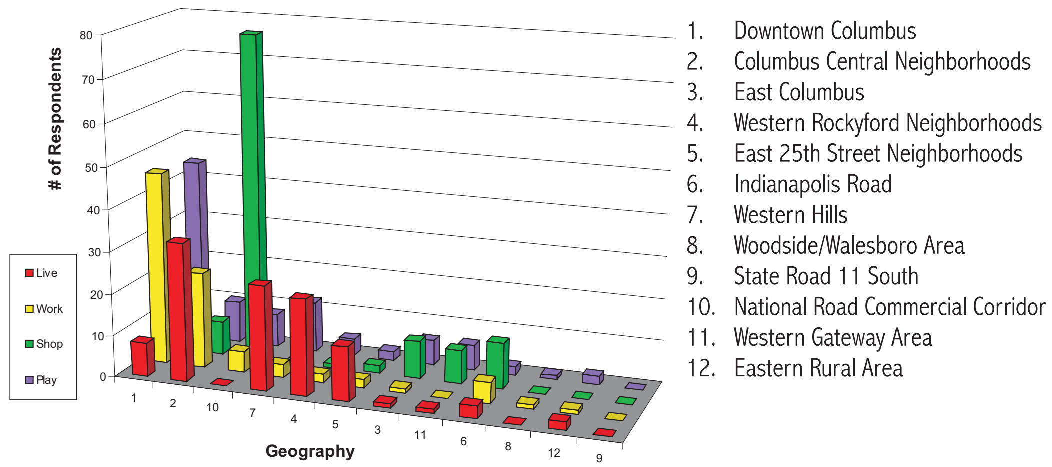
Communities throughout the Midwest are utilizing public art to improve their downtowns. Toledo Ohio's "It's Reigning Frogs" public art campaign featured dozens of fiberglass frogs placed around Downtown sidewalks for residents to view and interact.

Public Process

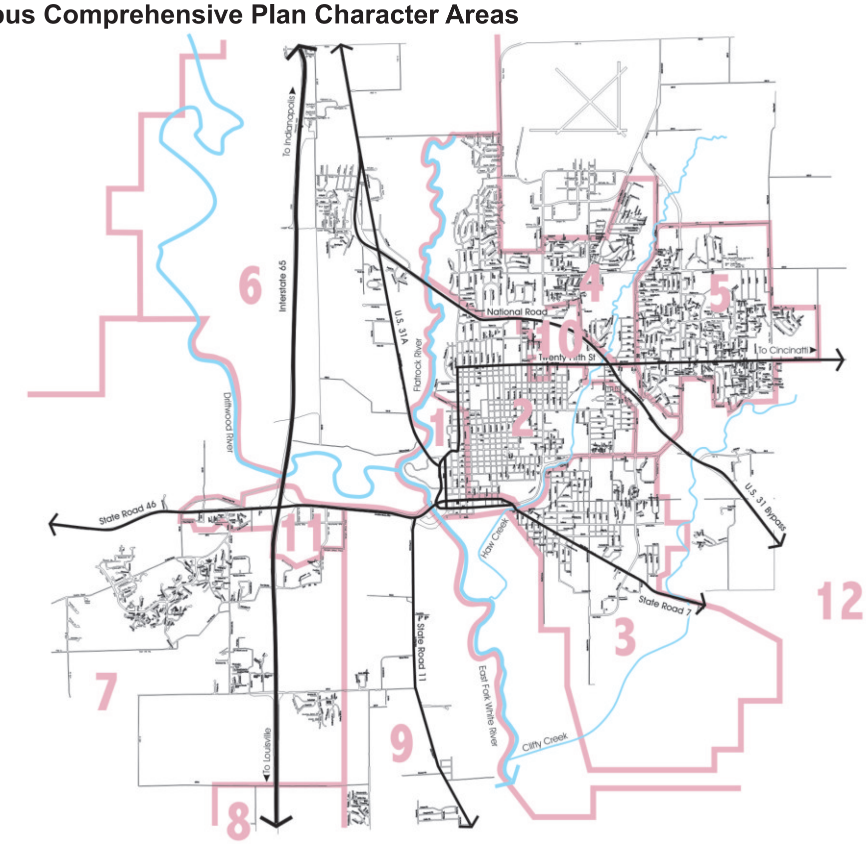
Overview

Part of a successful strategic planning effort includes developing an understanding of the community's desires and level of support. This information complements market and physical context data and is critical to the success of the overall plan. For the *Downtown Columbus Strategic Development Plan,* observations, preferences, and ideas were gathered in a variety of forums including; eleven Working Group meetings, four Vision 20/20 Committee meetings, five open houses, four focus groups (Live, Work, Play, and Shop markets), and surveys issued to four cross sections of the community (Community at Large, Downtown Employees, Downtown Businesses and Columbus students). In total, more than five thousand Columbus residents were involved in the planning process in some way. The following diagram illustrates a typical cross section of open house participants based on the Character Areas identified in the Columbus Comprehensive Plan, adopted in June of 2002.

Where do you Live, Work Shop and Play?



Columbus Comprehensive Plan Character Areas



Overall Public Process Findings

Key public process components included gathering input and data from:

- Approximately 350 participants at five open houses;
- 30 focus group participants addressing the four key markets (residential, employment, retail, and entertainment);
- Four surveys reaching over 5,000 residents or business owners; and
- Discussions with 50 key community stakeholders.

Key findings from public process activities include:

- **A segment of the market desires to live Downtown** (possibly 5-10% of the new home market), but they are looking for quality housing that meets their needs in clean, safe and friendly neighborhoods with updated infrastructure (i.e. sewer, water, and parking). They also want access to basic retail services nearby.

"In total, more than five thousand Columbus residents were involved in the planning process in some way."

- **Downtown employs 2,900 people** in predominately governmental, service and corporate businesses. Competition for service sector and corporate employment centers is strong within and outside of the local market. Other competition includes newer suburban developments that offer inexpensive land, with ample low cost parking, and fewer existing constraints.

- **Arts and culture has a significant following in Columbus.** The Columbus Indiana Philharmonic, which performs at venues in the downtown as well as elsewhere in the community, has 650 season ticket holders and sells out many of its performances. The Arts Council's programs at the Commons are well attended and include a wide variety of entertainment. The Crump Theater, with limited resources, successfully held 35 events with a total attendance of 3,000 in the last year.

- **Traffic generators are an important component of Downtown's market.** This includes Ethnic Expo (40,000 over 2 days); the Labor Day weekend Hospice benefit concert (20,000 in a day); Gospel Festival (22,000 over 3 days); PopFest (8,000 in a day); and NeighborFest (40,000 in August). Other attractions include the Mill Race Arts Council Events (35,000 per year); Commons Arts Council Events (55,000 per year); churches (6,700 total memberships near downtown); Columbus Museum of Art and Design (5,000 in 241 days) and the kidscommons (12,000 per year).

- **Youth/amateur sports events are a rapidly growing segment of the visitor market for the city.** Participants in these events (over 5,500 competitors and their families in 2004) are often housed out of town and do not frequent Downtown unless an event is hosted there for them.

Dell Brothers located near the intersection of Fourth and Washington Streets is an independent retailer in Downtown Columbus that offers men's clothing.

- Downtown independent retailers compete for market share with franchise and big "box retail" trends. **Offering more niche oriented goods and services, downtown businesses tend to serve a broad regional and visitor customer base** in addition to local markets --15-30% for retail goods and up to 40% for dining.




Elements of a Healthy Downtown

The 32 “Elements of a Healthy Downtown” (one method of measurement created by the consulting team) are the basic components necessary for a downtown “to work.” The inclusion of these components ensure an operational downtown, providing the foundation for types of investment and development necessary to make a unique and special downtown. The “Elements of a Healthy Downtown” are divided into the four categories of Leadership, Economic Development, Urban Design, and Programming. Downtown Columbus’ “Elements” were evaluated by a variety of community forums throughout the planning process. Columbus residents attending these forums concluded that Downtown currently excels in the areas of Landmarks, Preservation and Adaptive Reuse, Parks & Recreation, Civic/Public Buildings and Security; however, it is deficient in the areas of Parking, Defined Districts, Street-Level Retail, Economic Development Tools, Residential Base, Ethnic Themes/Diversity, Hospitality Area and Coordinated Marketing. These deficiencies must be addressed before downtown can prosper.

Elements of a Healthy Downtown

Leadership

Element	Grade
Coordinated Marketing	—
Promotions	✓-
Plan for the Future	✓
Security	+
Management	✓
Leadership Grade	✓

Programming

Element	Grade
Transit System	✓
Street-Level Retail	✓
Arts & Culture	✓
Entertainment	✓
Parks & Recreation	+
Residential Base	—
Urban Neighborhoods	✓
Ethnic Themes & Diversity	—
Hospitality Area	—
Civic/Public Buildings	+
Destination Places	✓
Programming Grade	✓

Urban Design

Element	Grade
Landmarks	+
Pedestrian Orientation & Scale	✓
Historic Fabric	✓
Sense of Place	✓
Open/Public Space	✓
Strong Linkages	✓
Gateways	✓
Defined Districts	—
Preservation & Adaptive Reuse	+
Parking	✓-
Understandable Traffic Network	✓
Urban Design Grade	✓

Economic Development

Element	Grade
Opportunities for Growth & Development	✓
Market Potential	✓
Activity Centers	✓
Public/Private Agenda	✓
Economic Development Tools	—
Economic Development Grade	✓

+ Dominant	✓+ Somewhat Dominant	✓ Apparent	✓- Somewhat Apparent	— Not apparent

This evaluation of Downtown Columbus' current status as measured by the Elements of a Healthy Downtown are substantiated by site analyses and market research. The Elements of a Healthy Downtown is a measuring tool used to establish a baseline of fundamentals needed to ensure an economically and socially viable downtown.

Community Surveys

All of the five survey groups (Community at Large, Downtown Employees, Downtown Businesses, and Columbus students) were asked questions from the following categories;

- Base line demographic data relevant to evaluating the profile of respondents for each cross section of the community.
- General questions principally about how well downtown serves the needs of either the respondents or their customers.
- Market specific questions addressing preferences, observations, and ideas concerning four market profiles: living, working, playing, and shopping in Downtown.

Overall response rate provided a sound statistical basis for determining community concerns, expectations, and interest in Downtown changes. In particular, the number of Community At Large respondents indicates a very strong interest by the citizenry of Columbus in the Downtown.

Community Survey Summary

Most Frequent Survey Comments

1. Parking, parking, parking… the majority of comments were about parking concerns.
2. Desire for retail specialty shops focusing on niche markets including lifestyle, children's, and gifts.
3. Desire for more entertainment choices especially non-programmed opportunities such as live music, kidscommons, and active sports/recreation (possibly along river).
4. Desire for more dining choices including family oriented gathering spots, and signature foods.

Survey - Findings from Questions

General

1. Most respondents find downtown shopping to be unsatisfactory and think it should be improved.
2. The majority of respondents, 60% to 88% (depending upon the survey audience), agree that Downtown parking has a reputation for being difficult in prime parking areas and times.
3. In general about 10- 20% of the respondents did not know what rating they would give Downtown as a place to Live, suggesting some lack of awareness of the benefits downtown offers for this market.
4. Most respondents travel to downtown destinations 1-5 times per month, with the 6-10 times or greater being significantly less frequent.
5. About 11% of the Employee respondents live outside of the two Columbus zip codes, while 11% (versus 5% of the Community respondents) live downtown.

Living

6. Most respondents own their own home and have lived in Columbus for 15 years or more.
7. About 94% of respondents live in single-family homes and of those who plan to move, 89% want to live in a single-family house and 10% indicated they would prefer to live in multi-family units or townhouses.
8. About 8.5% of the respondents would consider living downtown if their preference was available. The majority of these respondents were early career adults (19-35 years of age) or late career and older (55+ years of age). "Neighborhood" ranked significantly higher amongst community respondents than other factors when selecting where to live. It was followed by housing type, schools, and property values, in that order.

Working

9. Generally 95% of the respondents who work downtown drive to work.
10. One fifth or 20% of the respondents who work, work downtown, with students being the notable exception (less than 4%).
11. More than a quarter of the respondents (25 - 30% depending on the survey) would consider working downtown. Of these respondents, as much as 70% of the respondents are either early career (25-64 years of age) or late career (55-64 years of age) adults.
12. A third of respondents eat downtown 1-2 times per month. More than 70% of the Community Survey respondents work outside of downtown. Approximately half of the Employee Survey respondents eat in a restaurant, while two thirds spend $25 or less per week or go home for lunch.

Making Downtown Special...

The following were chosen by Columbus residents as the most appropriate words for distinguishing Downtown's desired regional image from other communities:

- Friendly
- Safe
- Cultural
- Vibrant
- Active
- Memorable

Most Important For Success...

The following were determined by residents to be the most important uses for Downtown Columbus to be successful within its region:

- Entertainment, food
- Entertainment, culture
- Parking
- Retail, convenience and personal services
- Retail, specialty
- Multi-family housing
- Recreation, active
- Convention and tourism

The pedestrian-friendly downtown core is centered around Washington Street — a “Main Street” with small offices and ancillary businesses, banks and restaurants. Pedestrian-friendly Washington Street is one of many aspects that makes Downtown Columbus memorable.

Columbus residents answer questions about downtown development during the April open house.

In addition to creating more lively and interesting places to live and shop, main street ... projects are beginning to attract a variety of employers, ranging from small ... to large world headquarters...
-ULI - Shopping Center Development Handbook

Plan recommendations were well-received by participants at the April open house.

Simple streetscape elements help establish an identity or sense of place in Downtown Columbus.

Play

13. While most people come to downtown for festivals, the majority go elsewhere for entertainment.
14. Respondents would frequent downtown more often for fine dining, casual dining (table service), performing arts, and special interest shops.
15. Most respondents spend $100 or less per week on food away from home.
16. It is most convenient for respondents to eat downtown in the evening and on weekends.

Shop

17. Respondents were equally divided between day, evening, and weekends as the most convenient time for shopping.
18. Downtown ranked lowest as a place to shop with Fair Oaks Mall, Clifty Crossing, Columbus Center, and Edinburgh Premium Outlets ranking the highest in that order.
19. Respondents generally seem satisfied with Downtown, though hours, merchandise selection, and price trended towards lesser responses.
20. Furniture, jewelry, banking, specialty retail, and professional service ranked highest amongst market areas selected for Downtown.
21. Apparel, specialty retail, furniture/decorations and housewares would tend to bring more people downtown to shop.

Destinations

Downtowns attract people for a variety of reasons including government and private services, employment, recreation, socialization and entertainment. A mix of various types and uses of destinations is what makes a downtown healthy and vibrant. The following top twelve destinations in Downtown Columbus were ranked by users, employees and leaders:

Top 12 Downtown Destinations by Resident Group

	Community	Employees	V 20/20
Church	**1**	**2**	**4**
Bank	**2**	**1**	**5**
Post office	**3**	6	9
City hall/Courthouse	**4**	**3**	**2**
Parks	**5**	10	8
Kidscommons	6	11	7
Entertainment	7	8	6
Library	8	9	10
Shopping	9	7	12
Professional services	10	**4**	**1**
Childrens museum	11	12	11
Visitors center/Arch. landmarks	12	**5**	**3**

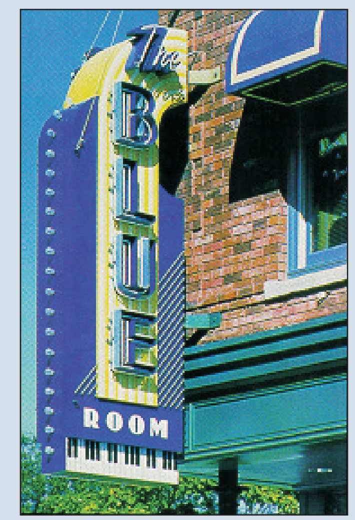
Numbers in bold indicate the top five ranked downtown destinations

Taking Stock of the Community – Findings

The following findings summarizes the physical, market and community analysis of Downtown Columbus. The findings synthesize the bulk of the analysis into a series of main points organized by the four market categories Live, Work, Shop and Play. The findings were affirmed by the Working Group, focus groups and the Vision 20/20 Downtown Committee.

Live
- Housing should provide local market for downtown by serving key segments.
- Establish linkages with neighborhoods so there is synergy with downtown.
- Create new urban housing product focused on market-rate segment.
- Provide quality housing in and around downtown.

Work
- Downtown has a strong business base, including large and small ventures, but needs to increase support for downtown entrepreneurs.
- Many downtown employees leave after work, living, shopping, and playing elsewhere.
- Some downtown employees do not shop or lunch in the ½ mile trade area.
- An education anchor would extend “work day” activity and serve workforce needs.



Play
- No “critical mass” of entertainment in downtown.
- Mostly passive recreation options
- Entertainment is heavily weighted towards food with limited alternate offerings.
- A new role for downtown is niche entertainment… missing in Columbus.
- Downtown play does not offer “something for everyone” living in Columbus.

Shop
- Retail competition outside of downtown has increased for customers living in downtown in the last five years.
- Downtown retail offers few goods for local residents and visitors to Columbus.
- Downtown storefront space is not configured to leverage and activate retail.
- The range of retail offerings in the downtown is limited.

[1] U.S. Census 2000.
[2] Richard Florida, “The Rise of the Creative Class: and how it's transforming work, leisure, community and everyday life”, Basic Books, 2002.
[3] Bridget Lane, Consultant, Business Developments, Inc. Chicago, Illinois